

Automating Online Signup, Payment, and Software Distribution

You can have a completely automated, web-based registration, payment, and software distribution system for your RBS business that runs from your own web site. Accept credit cards, debit cards, PayPal, and electronic checks. Offer trial accounts without requiring a credit card. Follow up with customers through an automated email system that SELLS your service for you automatically.

Here's what you can do:

For Trial Accounts

1. Provide a link on your web site for users to sign up for a free trial account.
2. Collect enough information through a web-based form to contact the user at the end of his trial period to sell him the service.
3. Automatically verify the email address to make sure you have a live prospect before allowing him to download software.
4. Download and install the free trial software immediately, and open a trial account automatically.
5. Activate an autoresponder which will automatically send out a series of emails every few days, mentioning the benefits of using your service. Include a link to purchase a live account. The final email (after 30 days) should be stronger than the rest, and perhaps offer a discount or premium for signing up now.

For Paid Accounts

1. Provide links on your web site for users to purchase different packages of services or to upgrade their Trial Accounts.
2. Collect billing information through a web form, and collect charges through an online payment gateway.
3. Accept payment by credit card, debit card, online check, or PayPal.
4. Automatically download and install the software immediately, and open an account on the RBS Server.
5. Automatically bill credit cards monthly for recurring service charges.

We have designed some procedures that can completely automate the web-based registration, payment, and software distribution for your Remote Backup Service. These procedures rely on a web service provided by 1ShoppingCart.com, an online shopping cart program

These procedures require an RBS Pro Pack, a 1ShoppingCart.com account, and (depending on what payments you will accept), a Merchant Account and/or a PayPal account. No other software is required.

We have tested these procedures using a "Professional Monthly Recurring" plan from 1ShoppingCart.com which (at the time of this writing) costs US\$79 per month. Less expensive plans may work with these procedures, or the procedures might be able to be modified to work with less expensive plans or with other online Shopping Cart vendors.

Please note: Remote Backup Systems cannot help you set up your 1ShoppingCart.com account, your Merchant Account, or your PayPal account. The first two accounts are not easy to set up, and there are many options for each. There will be some trial and error setting up the 1ShoppingCart account. You should read the documentation on the 1ShoppingCart.com web site and PLEASE contact 1ShoppingCart.com for assistance instead of RBS.

RBS Explains it All (almost...)

The tools you will use at 1ShoppingCart.com allow for an almost infinite variety of methods for integrating your web site with their Payment Gateway and email autoresponders. I'll explain the simple way we automated the online registration process for Trial Accounts and for Paid Accounts on a sample web site. You can experiment and enhance our basic procedure until you get your process the way you want it.

Note on Trial Accounts: While I will explain how to do Trial Accounts, in our experience, trial accounts convert to paid accounts at a surprisingly low rate if you don't use the right kind of follow-up, or if there's something wrong with your sales technique, or if you target the wrong market segment, or if the moon is full and a black cat walks across your fence in June. Many successful Service Providers don't offer trial accounts at all.

It starts out with links.

The whole process starts out with links on your web site. There are two kinds: Trial Account Links, and Paid Account Links.

Trial Accounts

The purpose of the Trial Account link is to collect enough information for a follow-up sale, and to distribute your trial software without being required to enter a credit card number. For this, we will rely on 1ShoppingCart.com's Autoresponders and Custom Forms.

The basic idea is this: The user clicks a "Open a Free Trial Account" link on your web site. The user is transferred to a form on the 1ShoppingCart web site. The form collects contact information and stores it in a database. It then emails the user at the address he entered, thanking him for signing up for a trial account, and giving him a link that he can click to verify his registration.

The link in the email is custom-generated for each user. Clicking on it verifies that the email was sent to the address entered on the web form. If the address verifies, 1ShoppingCart places the email address in a database so it can automatically follow up with scheduled emails for the next 30 days, and the user is automatically sent to your Online Installer.

The user installs the trial software, and the Registration Wizard makes sure a new Trial Account is added to your RBS Server.

For the next 30 days (or the length of your trial period) 1ShoppingCart will send emails that you can design, on a schedule that you can set. The emails do your follow-up sales for you automatically. If your users reply to one of them, the reply goes directly to you.

Each email should contain a link to sign up for a Paid Account.

Paid Accounts

The purpose of the Paid Account link is to accept payment and distribute your live software. For this we will rely on 1ShoppingCart's Shopping Cart and Payment Gateway.

The paid account link goes to a configurable shopping cart where your users can enter their payment information by credit card, debit card, PayPal, or Online Check. In the case of an Online Check, 1ShoppingCart will send you an email with all the information you need to write a check on the user's checking account using the *Checker* software in your RBS Business Kit. You can deposit the check just like your customer had written it, and no signature is required.

To accept payments by PayPal, you will need a PayPal account. Go to [paypal.com](https://www.paypal.com) to apply. To accept payments by credit cards and debit cards, you will need a merchant account. Contact your bank to apply, or search online for "Merchant Account".

The 1ShoppingCart service automatically sends money into your PayPal account and your merchant account, and sends you an email notifying you of the payment. It can also be set up to charge a recurring payment monthly.

Setting Up Trial Accounts with 1ShoppingCart.com

Please consult 1ShoppingCart.com for help setting up their service. Their screens might have changed since we developed this procedure.

An Autoresponder is a piece of software that collects and maintains a list of email addresses that users have entered, and which have been verified by the user through an opt-in email and custom link.

You set up a series of emails that you would like to have sent to your customers, and the autoresponder sends them on the schedule that you set up. If one of the emails bounces because of a bad address, the autoresponder removes the address from the list. If a customer replies to one of the emails, the reply comes directly to your email address and you can respond directly.

Autoresponders can be set up to send merged emails - emails that contain customers' names and other info, making them appear to be sent personally. They can do much of your follow-up sales contact for you automatically.

Trial accounts are driven by autoresponders and their Thank You pages. Here's what the customer experience looks like:

The customer clicks a link on your web site to download your trial version. It can be any kind of link - a text or a picture. The customer is transferred to a form which you have set up on the 1ShoppingCart.com web site.

Full Name :	<input type="text"/>
Company :	<input type="text"/>
Email :	<input type="text"/>
Home Phone :	<input type="text"/>
Work Phone :	<input type="text"/>
Fax :	<input type="text"/>
Address 1 :	<input type="text"/>
Address 2 :	<input type="text"/>
City/Town :	<input type="text"/>
State/Province :	<input type="text"/>
Zip/Postcode :	<input type="text"/>
Country :	<input type="text" value="United States"/>

Required Fields are in BOLD

SUBMIT

CANCEL

1ShoppingCart.com lets you design the look and feel of the page, so it can look very much like your own web site. We have selected a plain default page.

The user enters his information here and clicks the Submit button. The Autoresponder then displays a page from your web site called a Thank You page. This is a standard HTML web page. Usually it contains some words similar to the following:

Thank you for opening a trial account. A confirmation email has been sent to the email address you entered. Please check your email and click the link in it to download your trial software.

(Figure 1) In a few minutes, the email arrives in the user's Inbox:

From: SaveData.com

To: Jeff

Subject: Please confirm your trial account.

Hello,

Thank you for requesting a free Trial Account from SaveData. Please click the following link to confirm your request and download your software.

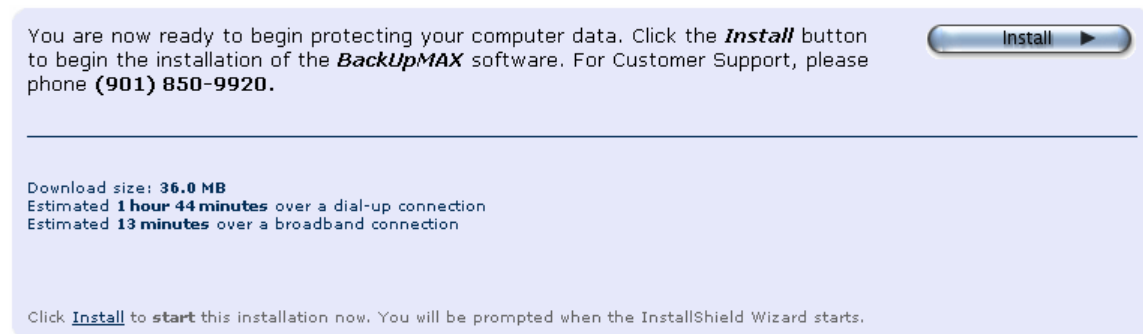
<http://www.1shoppingcart.com/app/optin.asp?j=0&c=94021418>

SaveData.com
324 Poplar View Parkway
Collierville, TN
38017, USA

The special link in the above email was generated by the Autoresponder. It is used for this customer only. The idea is that if this email shows up in the customer's inbox (in this case, Jeff), and Jeff actually asked for the trial account instead of some scamp entering someone else's email address, Jeff can verify it by clicking on it.

If Jeff clicks the link, the Autoresponder marks his email address as "verified" and transfers Jeff's browser to the "Join Our Mailing List Thank You page" that you have entered into the Autoresponder Opt-In Preferences below.

But here's the trick we're using to distribute the Client software: Instead of an actual HTML page that displays a simple "Thank You" message like most people use, we're pointing our Thank You page at the trial version of our Online Installer. So, instead of a simple "Thanks," Jeff gets to install our software. Cool, yes?



Now you have Jeff's verified email address in your autoresponder, which is automatically going to try to sell him your service over the next 30 days, and Jeff has your trial software. The Registration Wizard takes care of opening his trial account on your RBS Server. This all happens while you're out buying dinner for your mother like a good son or daughter, and it's all automatic.

OK, that's how it looks from a customer's perspective. Now let's see how to set that up.

Create Autoresponder

Select Autoresponders, then Create Autoresponder.



Fill in the blanks. Give your autoresponder a name. The Autoresponder ID and Subscribe-by-Email Address will already be filled in.

General Settings	
Autoresponder Name	Free Trial Account
Autoresponder ID	195004
Subscribe-by-Email Address	iaqwrrangler-195004@autocontactor.com
Unsubscribe Autoresponder	
From Email Address	info@backupmax.com
From Name	Sales Department
Sharable	No <input type="button" value="v"/>
Opt-In Verification Message	Trial Account Verification (Approved) <input type="button" value="v"/> View Email
You currently DO have Opt-In Verification turned on. Click here to change this setting.	
<input type="button" value="Save"/> <input type="button" value="New Message"/> <input type="button" value="Test"/> <input type="button" value="Back"/>	

The From Email Address is the address that will show up in the FROM field of all the emails the autoresponder sends. This should be YOUR email address, so when your customers respond to the Autoresponder emails, the responses come directly to you.

The From Name should be your name.

I don't know what "Sharable" means.

Opt-In Verification Message is the message that will be emailed to your customers after they fill out the form. See Figure 1 for an example as it appears in the customer's inbox.

This message must be set up under Opt-In Preferences (see below) and must be approved by a live person at 1ShoppingCart.com before you will be allowed to use it. For now, select a default message. Come back here later, after you have created your message (below) and it has been

approved. Use the Autoresponder, Manage Autoresponder menu choice to come back here later and select your newly-approved message.

Turn ON Opt-In Verification.

Add your sales messages

Click the New Message button to begin adding your autoresponder messages. You may add as many as you like, but use caution against sending so many that your customers consider it spam.

Go To Message	We hope you are enjoying your trial acco...- 10 days delay ▾
Days Delay	10
Message Type	<input type="radio"/> Text <input checked="" type="radio"/> HTML Preview
Alternate Destination	
Subject Line	We hope you are enjoying your trial account.
Message Body	
<div>Hi <\$firstname\$>, We hope you are enjoying your trial account. If we can answer any questions for you, please just let us know. Whenever you want to convert your trial account to a live account, just visit our web site or click the following link. Click Here to Purchase Regards, Sales Department SaveData.com 800-888-8788</div>	

Create your Opt-In Form

Select Custom Forms, and Opt-In Forms. This is where you create the web form that your customers will fill out to register for your free trial account.



Select all the fields you want to collect information about. Note the "Questionnaire/Contact Form link URL" which has been generated for you. You will need this URL later. This is the contents of your "Sign up for our free Trial Account" link that you put on your web page.

Select all the fields you want to collect on this form, and click "Continue to Step 2"

Questionnaire/Contact Form link URL ?
http://www.1shoppingcart.com/app/contact.asp?id=51087 test
Join Our List link URL ?
http://www.1shoppingcart.com/app/join.asp?merchantid=51087 test

Questionnaire Form Contact Fields			
Note: If a field is Required, it must be Visible.			
Name:	<input type="checkbox"/> Visible <input type="checkbox"/> Required	Address 1:	<input type="checkbox"/> Visible <input type="checkbox"/> Required
Email:	(always required)	Address 2:	<input type="checkbox"/> Visible <input type="checkbox"/> Required
Company:	<input type="checkbox"/> Visible <input type="checkbox"/> Required	City/Town:	<input type="checkbox"/> Visible <input type="checkbox"/> Required
DayPhone:	<input type="checkbox"/> Visible <input type="checkbox"/> Required	State/Province:	<input type="checkbox"/> Visible <input type="checkbox"/> Required
HomePhone:	<input type="checkbox"/> Visible <input type="checkbox"/> Required	Zip/Postal Code:	<input type="checkbox"/> Visible <input type="checkbox"/> Required
Fax:	<input type="checkbox"/> Visible <input type="checkbox"/> Required	Country:	<input type="checkbox"/> Visible <input type="checkbox"/> Required

Continue to Step 2

Fill in the following data on the next page:

"Copied on Form data..." Enter Yes

"Questionnaire Autoresponder" Select the name of your newly-created Autoresponder from the pull-down menu.

"Questionnaire Thank You URL" Enter the URL of your Thank You web page on your web site. This MUST be created before you enter it here. The 1ShoppingCart.com software will check to make sure it's there, and will use a default page if it's not.

"Join Our Mailing List Autoresponder" Select the same autoresponder you selected before.

"Join Our Mailing List Thank You URL" Enter the URL to the free trial version of your Online Installer. This URL must exist as well, or 1ShoppingCart.com will use a default Thank You page.

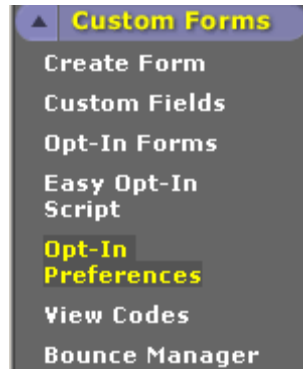
The other fields are used to make the pages look pretty. You can fill them in as you like.

Autoresponder and Thank You URLs	
Copied on Form data and Autoresponder Responses:	<input type="button" value="Yes"/>
Questionnaire Autoresponder:	<input type="button" value="Free Trial Account"/>
Questionnaire Thank You URL:	<input type="text" value="backupmax.com/test/thankyoutrial.htm"/> use default
Join Our Mailing List Autoresponder:	<input type="button" value="Free Trial Account"/>
Join Our Mailing List Thank You URL:	<input type="text" value="backupmax.com/freetrial/index.htm"/> use default
Form Confirmation Message	
<div><div></div><div></div></div>	
Questionnaire Form Top HTML	
<div><div></div><div></div></div>	
Questionnaire Form Bottom HTML	
<div><div></div><div></div></div>	

That's it, you have created your new custom form.

Set your Opt-In Preferences

Select Custom Forms, and Opt-In Preferences. This is where you set up the way your Opt-In form processes its information, and determines what it does afterwards. In this case, we want it to go to your free trial Online Installer.



Set up your Opt-In Preferences like this example. The "Opt-In Message Thank You URL" should be the URL of your free trial Online Installer.

Require Opt-In Verification for Webform Submissions	Yes
System Opt-In Message	Trial Account Verification (Approved)
Opt-In Message Thank You URL	http://savedata.com/freetrial/index.htm

Design your verification message. This is the email that is sent to your customers after they have filled in your web form requesting a trial account. Be sure you include the <\$optInLink\$> tag. That's the link they click to download your Online Installer.

Custom Message	
Message Name	Trial Account Verification
From Name	SaveData Sales
From Email	sales@savedata.com
Subject	Please confirm your Trial Account.
Body	<p>(Please enter merge codes exactly like <\$...\$>, do not enter &lt;\$...\$&gt;)</p> <p>Hello,</p> <p>Thank you for requestiong a free Trial Account from SaveDatacom. Please click the following link to confirm your request and download your software.</p> <p><\$optInLink\$></p>

Note: Your clients will be transferred to the Thank You URL entered after clicking the opt-in link within the confirmation email they receive information as a signature on all outgoing email.

Thank You URL	http://savedata.com/freetrial/index.htm
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I don't know why you have to enter your free trial Online Installer URL so often. But do it again here.

The Free Trial Link

Install the link on your web site. It should look something like this:

[
Click Here for a Free Trial Account](http://www.1shoppingcart.com/app/optin.asp?j=0&c=94021418)

Wrapping it All Up

The 1ShoppingCart.com application contains many features that I did not discuss here. For example, I didn't tell you how to set it up so you get an email whenever someone signs up for a free trial account, or how to run the built-in affiliate program.

Please look around the 1ShoppingCart.com interface to find out how to use the features you need.

Setting Up Paid Accounts with 1ShoppingCart.com

This is how your customers buy your Service and pay you for it.

Web site users click a link to purchase a backup plan that they want. It starts with a link on your web site, something like "Buy the Large Office Backup Plan" which links to 1ShoppingCart.com to purchase that Service Plan.

The 1ShoppingCart.com web site displays a customizable web page where your customers can enter their contact information, select a payment method, and enter their credit card number, checking account info, or PayPal account info.

The 1ShoppingCart system validates the payment method, charges the credit card, and if the charge is approved, sends emails to you and your customer, and then transfers the customer to your Online Installer, where your customer can download your software.

Thereafter, 1ShoppingCart.com can charge the customer's credit card every month.

1ShoppingCart.com handles paid accounts differently than trial accounts. It is somewhat more difficult to set up paid accounts, not because of the 1ShoppingCart.com interface, but mainly because of the trouble of setting up a Merchant Account to be able to accept credit and debit cards online.

Since procedures vary so from vendor to vendor, I am not going to discuss how to set up merchant accounts or PayPal accounts, and will assume that you already have them set up.

Paid Accounts are based on what 1ShoppingCart calls "Products." These are like inventory items - things that you sell. Products can be physical items, or services, or subscriptions.

The first thing you'll have to do is to set up your Cart (Cart Setup) which defines the look and feel of your web pages, and how 1ShoppingCart.com gets your money to you. You may have already set up your Cart, since you probably had to do so to get your autoresponder set up.

I am not going to explain how to set up your cart. The procedure varies too much depending on your service level, merchant account, and many other factors.

Adding Products



Each of your Service Plans will be a product. Here's an example from a web site we've used to test this procedure:

Product Name	SKU	Price	Action
BackupMax Large Office Backup Plan, Monthly Recurring	RBS-4-1	\$189.00	Test Edit Delete
BackupMax Personal Backup Plan, Monthly Recurring	RBS-1-1	\$1.00	Test Edit Delete
BackupMax Professional Backup Plan, Monthly Recurring	RBS-2-1	\$59.00	Test Edit Delete
BackupMax Small Office Backup Plan, Monthly Recurring	RBS-3-1	\$99.00	Test Edit Delete

There are four Products here, each corresponding to a Service Plan at a different price.

The service plans listed in this example are for people who do not have a trial account. If you are offering Trial Accounts, you may want to add more Products that can upgrade a Trial Account to a Live Account.

When you click Add Product, 1ShoppingCart.com displays the following page, which I'll explain in sections.

Here are the links you need to link your site with the Shopping Cart:

Regular Buy Me Link	http://www.1shoppingcart.com/app/netcart.asp?MerchantID=827 Test
One Click Buy Me Link	http://www.1shoppingcart.com/app/javanof.asp?MerchantID=827 Test

Edit Product Details: General Information

Product Description	BackupMax Large Office Backup Plan, Monthly Recurring	
Product Code/SKU	RBS-4-1	(optional)
Price	\$ 189.00	
Assign to Category	Select Category ▾	

- Use the **Save Changes** button to save the current changes to this product.
- Use the **Save As New** button to save this product with a current changes as a new product.

Save Changes

Save As New

This section names your product, sets its price, and gives you two URLs that your customers can click to purchase the product. The first URL, "Regular Buy Me Link" opens a standard Shopping Cart page where a customer can buy multiple items. We don't use that one.

We use the "One Click Buy Me Link." This link goes on your web site. When the customer clicks it, he is transferred to a secure web page where he can purchase this Service Plan.

Edit Product Details: Optional Values	
Shipping Price	\$ 0.00
Shipping Calculation	NO If you do not want this product to be included in shipping calculation, select NO.
State Tax	NO Should the shopping cart add for this product?
Country Tax	NO Should the shopping cart add for this product?
Weight	0 pound Please enter the product weight for shipping calculation . (optional)
Quantity Discounts	No Quantity Discounts Entered for this product. Edit Quantity Discounts
Product Primary Option	Label for option: An Option Required: NO Add/Delete/Edit
Product Option #2	Label for option: An Option Required: NO Add/Delete/Edit
Product Option #3	Label for option: An option Required: NO Add/Delete/Edit
Recurring Cycle	30 days If this product is used for recurring billing (which you plan to automatically charge cycle here. eg. 7 for weekly, 30 for monthly. Please note: There is a separate \$. this feature.
Recurring Count	Unlimited If there is a time limit on how many cycles you wish to limit this recurring product. Note that this is <i>in addition</i> to the initial order.
Recurring Start Duration	0 days Leave 0 or Blank, if you need to start the recurring cycle immediatley. Enter recur 7 means start recurring cycle after one week, 30 means start recurring cycle after
Recurring Price	\$ 189 If this product is used for recurring billing, what is the recurring price you wish to

I recommend setting up your product page with these options. This allows for recurring billing on a 30 day cycle. In this case, 1ShoppingCart.com will bill the customer \$189 every 30 days.

Recurring Shipping Calculation	<input type="button" value="NO"/> Would you like to charge shipping on recurring transactions?
Recurring Commission Rate	First Level: \$ <input type="text" value="n/a"/> Second Level: \$ <input type="text" value="n/a"/> These are first and second-tier commissions earned by your affiliates per unit sold . These amounts will be in place of the regular affiliate commission percentage for recurring products.
Recurring Commission Limit	<input type="button" value="Unlimited"/> How many billing cycles do you want to pay commission?
Destination URL	<input type="text"/>
Autoresponder	<input type="button" value="None"/>
Thank You URL	<input type="text" value="http://backupmax.com/OnlineInstaller4/index.htm"/>
Clear Cart URL	<input type="text"/>
Calculate Commission	<input type="button" value="Yes"/> Do you want to include this product when calculating commission earned by your affiliates? Selecting No will exempt this product from all commissions entirely.
Commission Rate	First Level: \$ <input type="text" value="n/a"/> Second Level: \$ <input type="text" value="n/a"/> These are first and second-tier commissions earned by your affiliates per unit sold . These amounts will be in place of the regular affiliate commission percentage for recurring products.
Top HTML	<input type="text"/>
Digital Product Filename	Browse for the file you want to upload, then hit save changes. <input type="text"/> <input type="button" value="Browse..."/>

The rest of the Product page looks like this. The most important part of this page is the "Thank You URL". In the case of a customer who does not have a Trial Account, it should point to your Online Installer for this Service Plan.

In the case of a customer who DOES have a trial account, the "Thank You URL" should point to a web page that simply thanks the customer instead of downloading software, and you should upgrade the trial account to a live account when you receive the order confirmation from 1ShoppingCart.com.